

# **Hawai'i Visitors & Convention Bureau Marketing Update**

**February 14, 2005**

# HVCB Marketing Continuum





# **2004 Results**

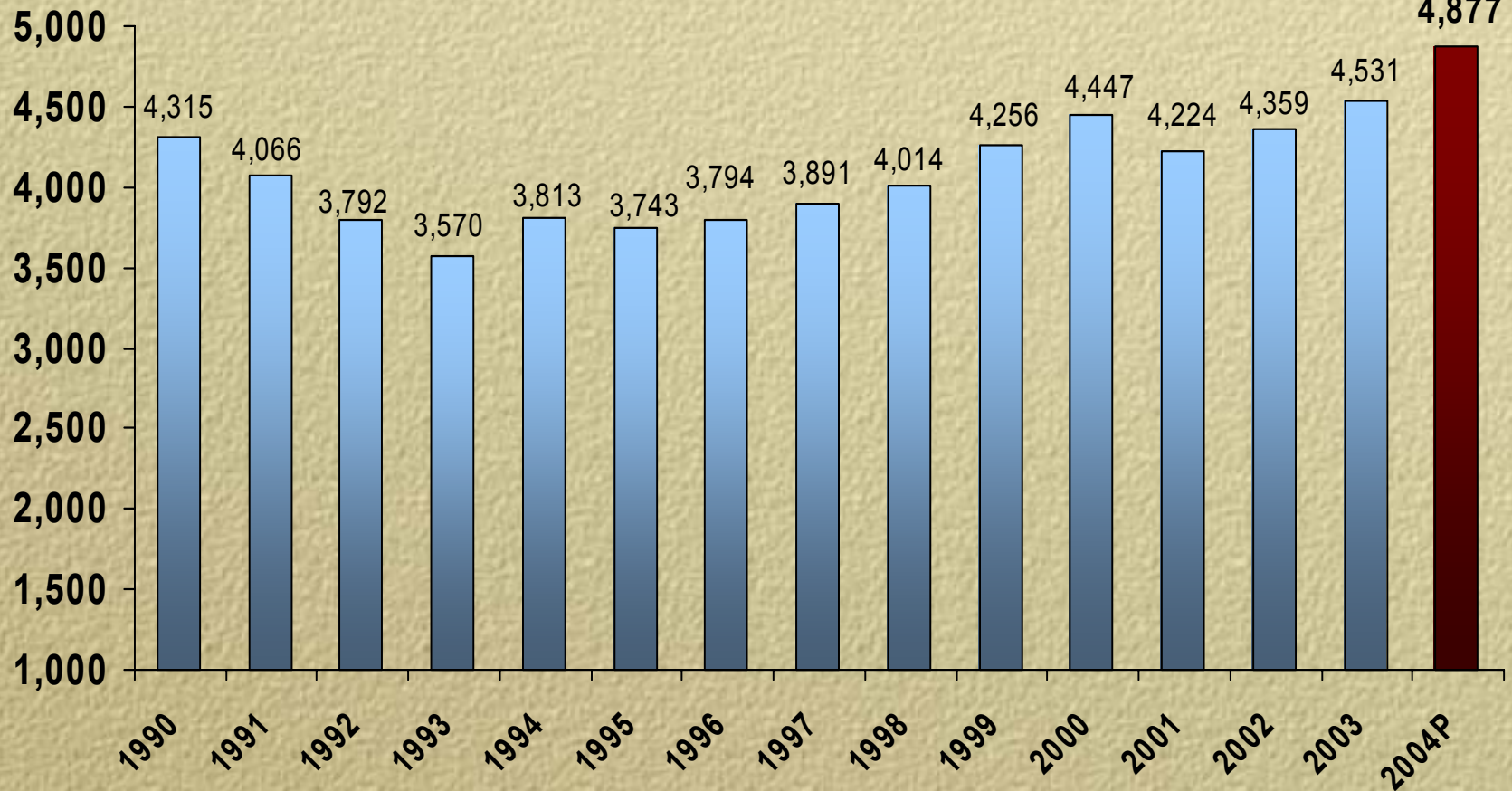
## **Market Measures**

# Domestic Visitor Arrivals to Hawai'i

## 1990 – 2004 (P)

In Thousands (000)

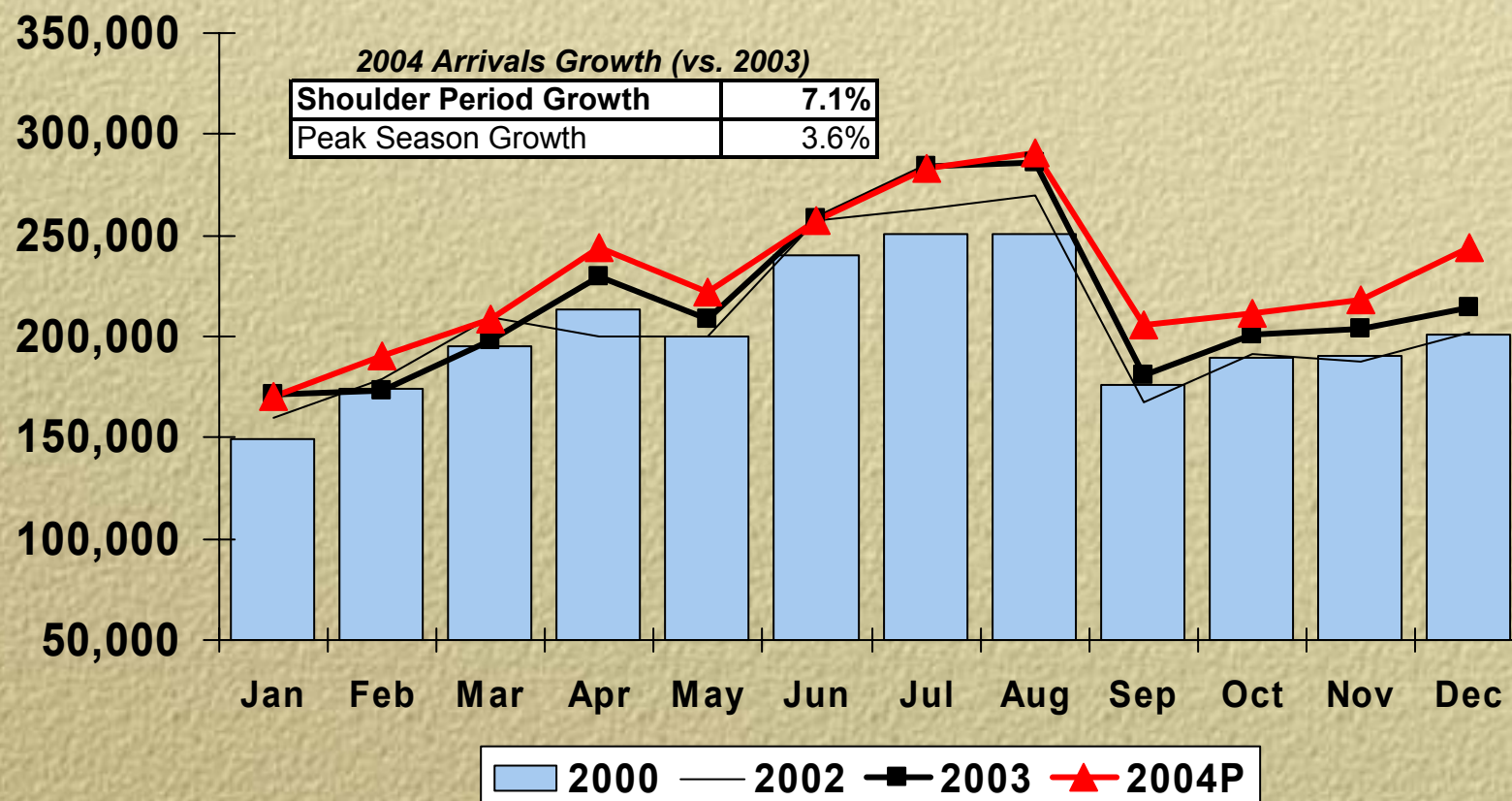
Record High in 2004



Source: HVCB Market Trends analysis based on historic DBEDT data; P = Preliminary

# U.S. West Arrivals

## Monthly Arrivals (Preliminary 2004 vs. 2000, 2002 & 2003)

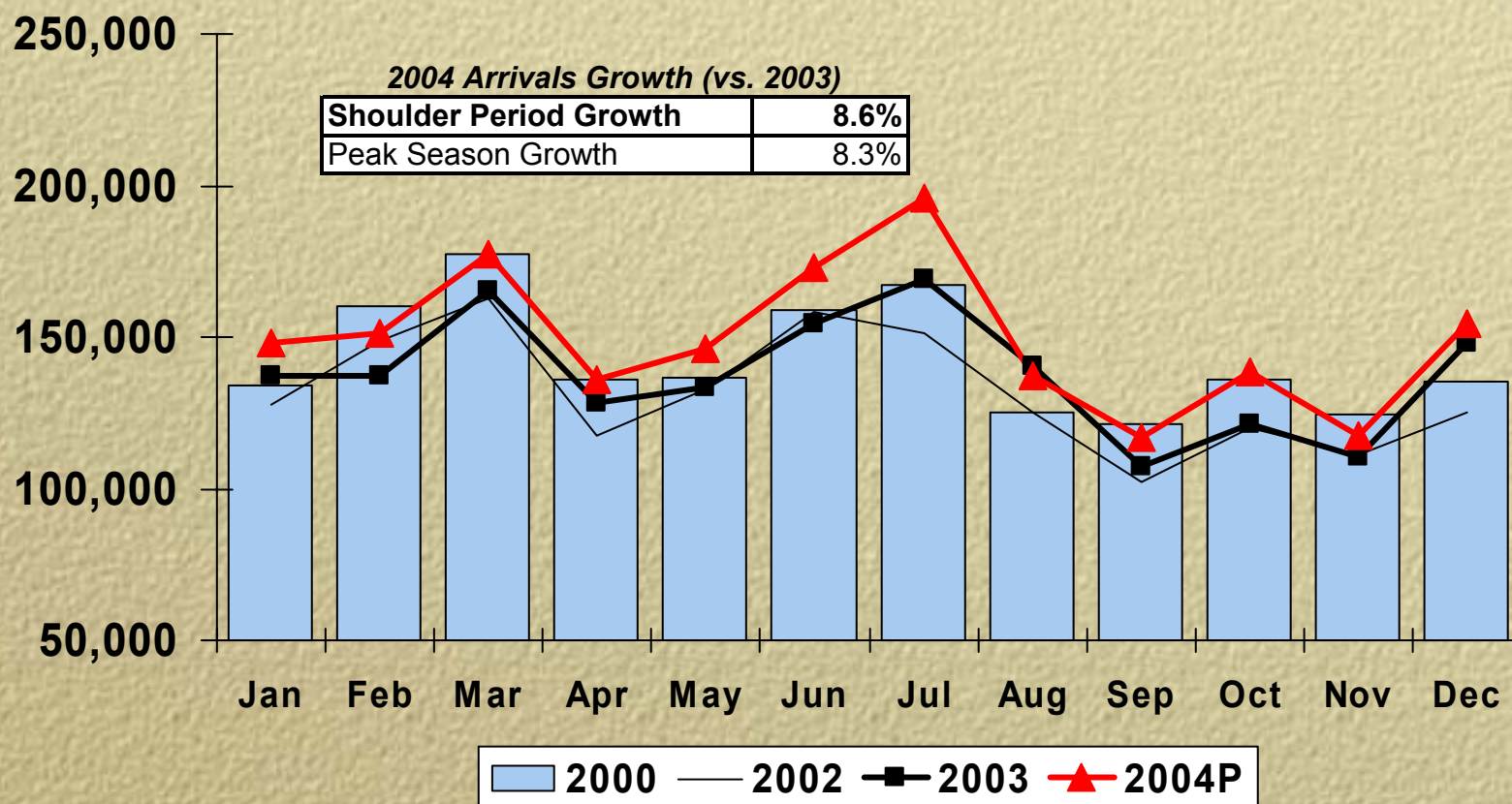


Note: Shoulder period months are defined as March, April, May; and September, October, November

Source: HVCB Market Trends analysis based on DBEDT data.

# U.S. East Arrivals

## Monthly Arrivals (Preliminary 2004 vs. 2000, 2002 & 2003)



Note: Shoulder period months are defined as March, April, May; and September, October, November

Source: HVCB Market Trends analysis based on DBEDT data.

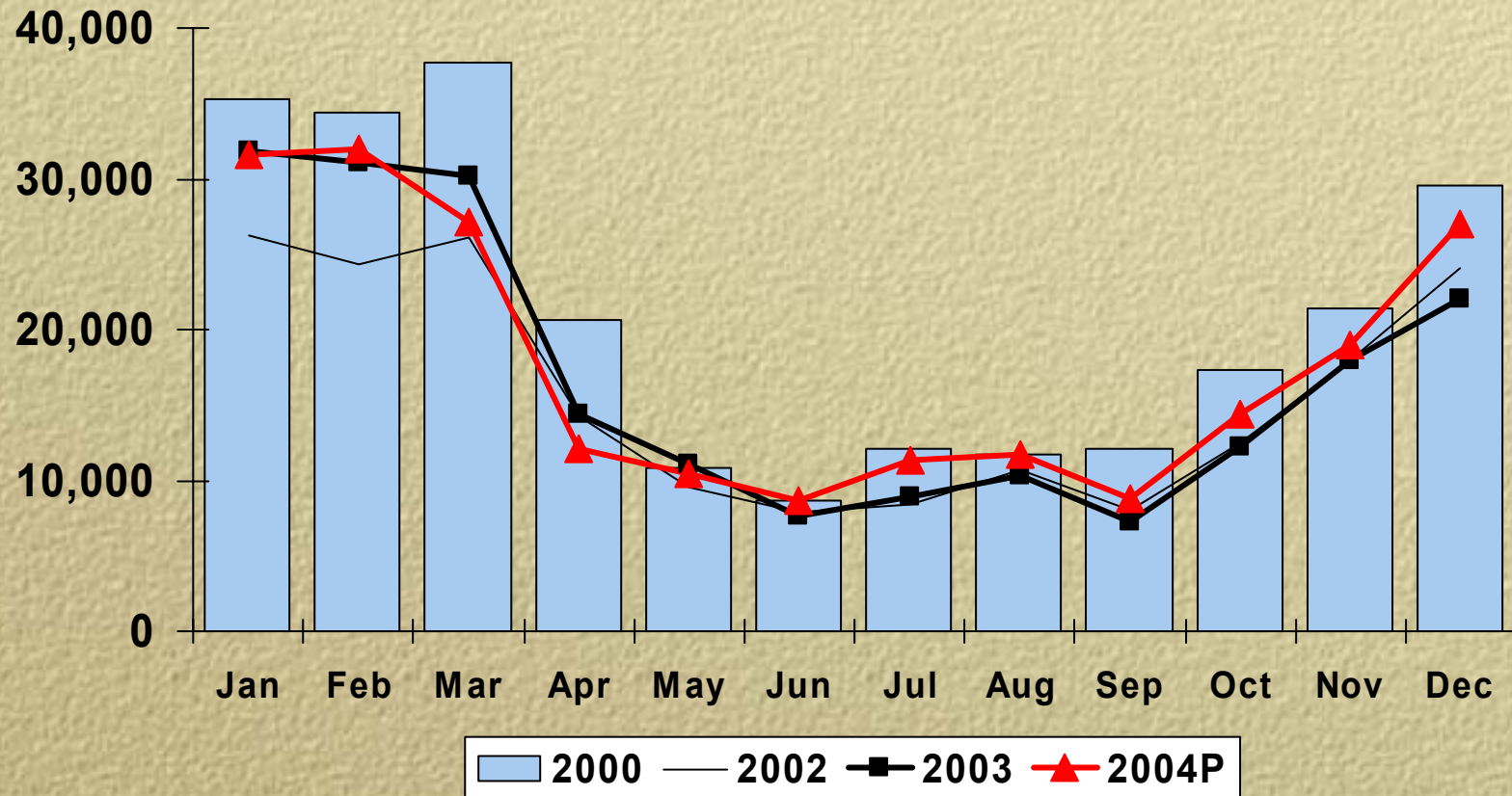
# Arrivals from North America

Ahead of 2004 Target

MMA	HTA'S 2004 Target	2004 Actual (Preliminary)	Points Ahead of Target
U.S. West	2.5%	5.4%	+2.9
U.S. East	3.4%	8.9%	+5.5
Canada	3.3%	4.7%	+1.4

# Canada Arrivals

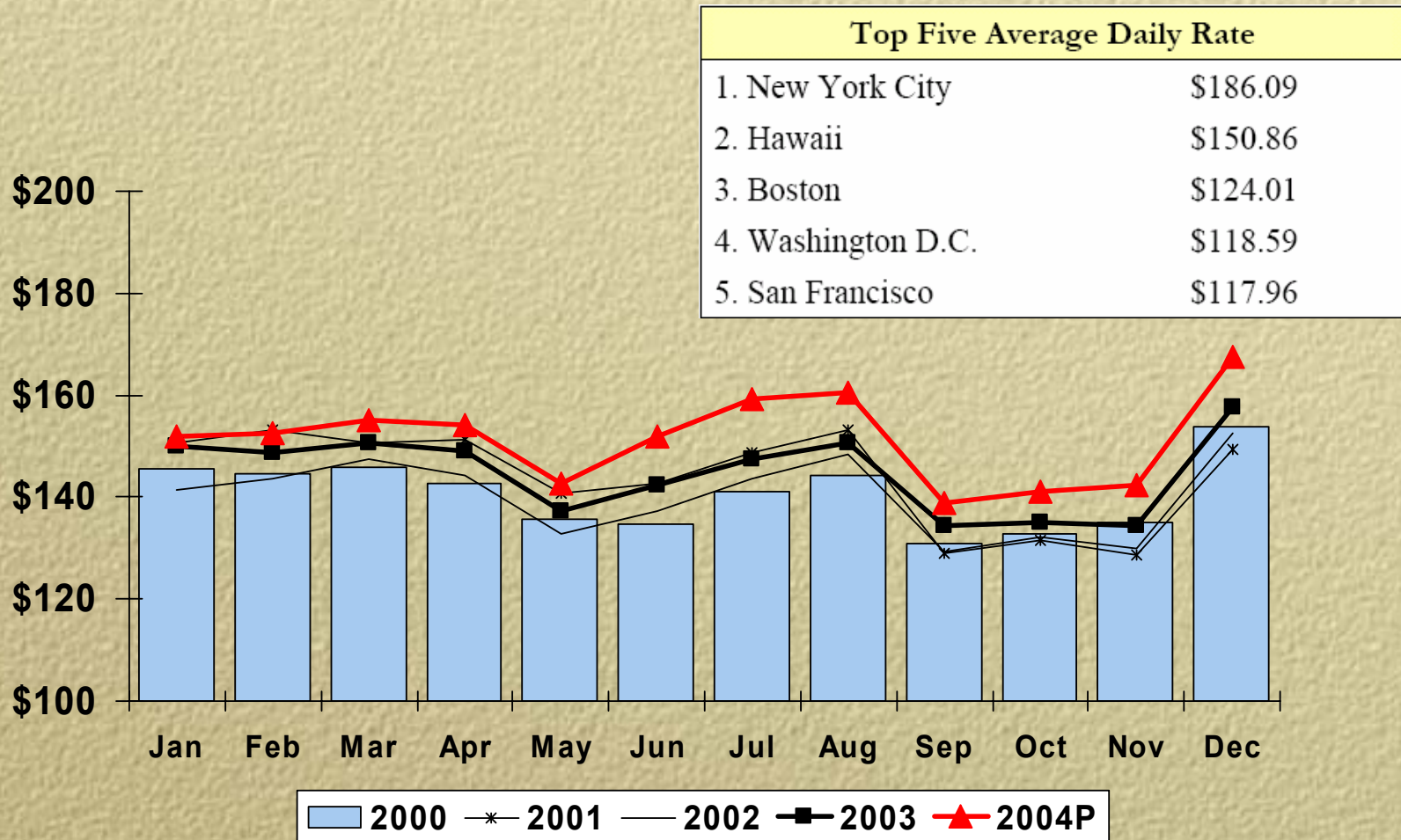
Monthly Arrivals (Preliminary 2004 vs. 2000, 2002 & 2003)



Source: HVCB Market Trends analysis based on DBEDT data.

# Hawai'i Statewide Average Daily Rates

## Monthly ADRs (Preliminary 2004 vs. 2000, 2001, 2002 & 2003)

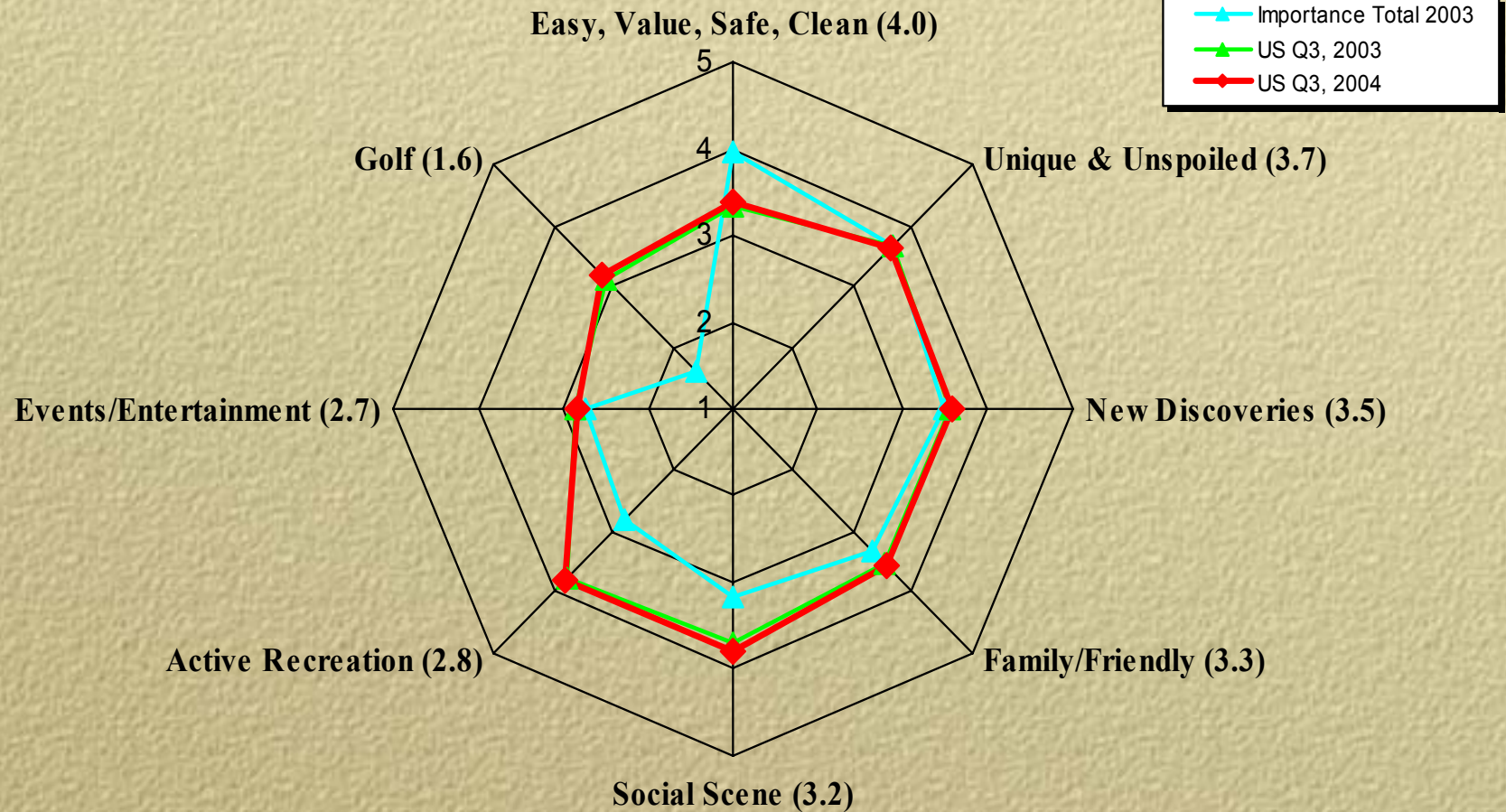


Source: Hospitality Advisors, LLC and Smith Travel Research

# U.S. Market

## Importance of Factors and Rating of Hawai'i

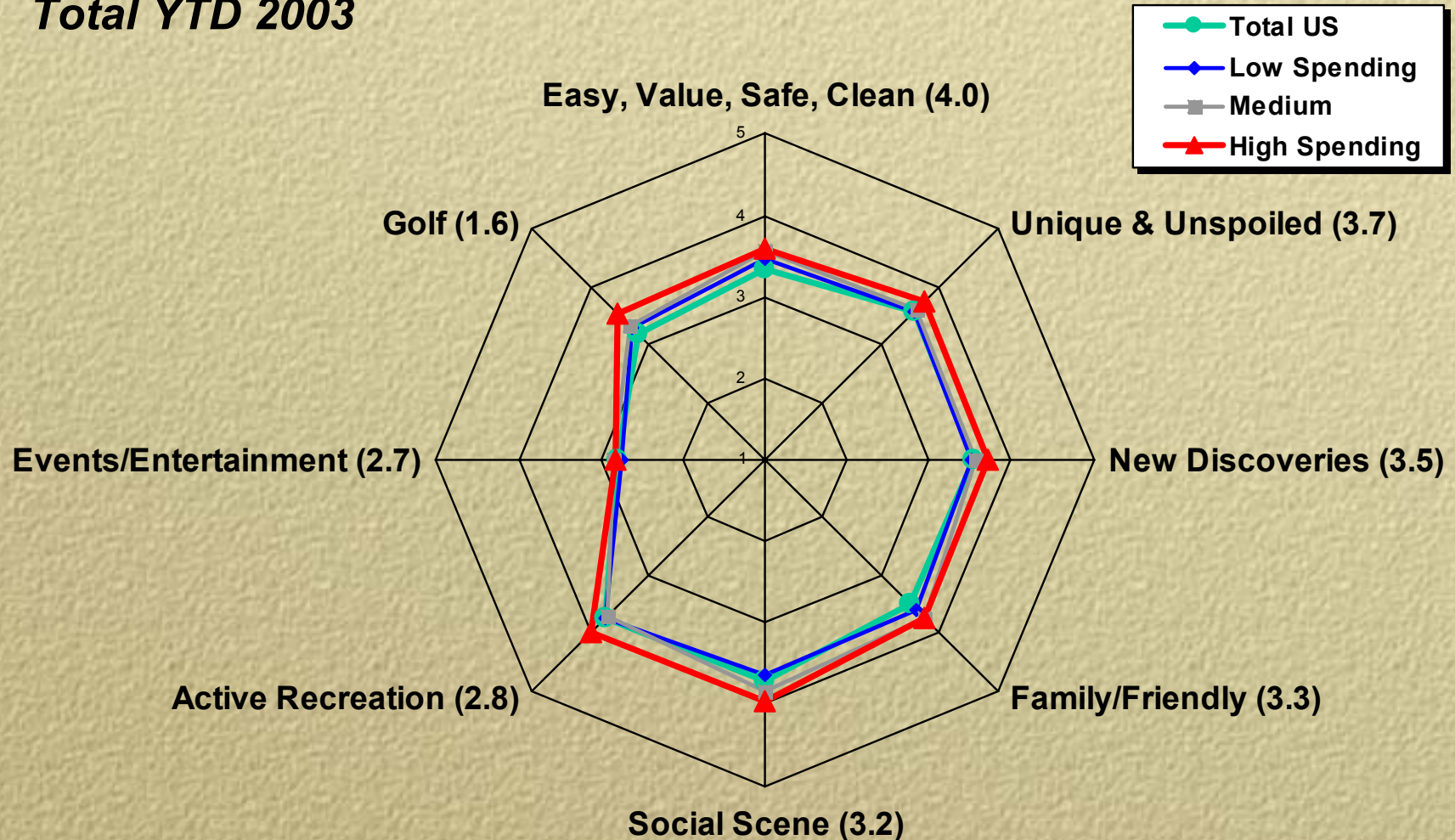
**Q3 2003 / Q3 2004**



# U.S. Market

## Rating of Hawai'i by Spending Level

**Total YTD 2003**



# **2004 Results**

## **Program Measures**

# Cooperative Programs

Travel Trade - *Come Experience Aloha!*

- 11 Travel Wholesaler coop partners
- Wholesaler investment: \$445K
- HTA/HVCB investment: \$362K

# Cooperative Programs

## Travel Trade - Come Experience Aloha!

### This Fall, VOLCANOES WON'T BE THE ONLY HOTSPOTS IN HAWAII'I.

This fall, the people of Hawai'i invite you to discover the many events and activities – including the Honolulu Marathon, PGA Grand Slam of Surfing, Aloha Festivals, and Taste of Lahaina – that make the Big Island so invigorating. When summer winds down and you're looking for a way to stay active, Come Experience Aloha in Hawai'i. It may be fall, but we're just getting warmed-up. Plan your trip now at [pleasantholidays.com](http://pleasantholidays.com)



#### American Airlines® Hawaii Fall Sale

5 Nights Hotel & Air

Oahu: OHANA Maie Sky Court  
Includes 1st night FREE

from \$569

Mau: OHANA Maui Islander  
Includes 1st night FREE

from \$749

Oahu: ASTON Waikiki Beach Hotel  
Includes 3rd night FREE, 2-for-1 lunch & breakfast on the beach

from \$835

Mau: Kaanapali Beach Hotel  
Guaranteed one-category upgrade

from \$939

Big Island: Royal Kona Resort  
Includes 3rd night FREE & breakfast

from \$949

Kauai: Radisson Kai  
Includes 3rd night FREE

Kauai: Manicott Kauai Resort & Beach Club  
Includes 3rd night FREE, room upgrade & 75 food & beverage credit

from \$1215

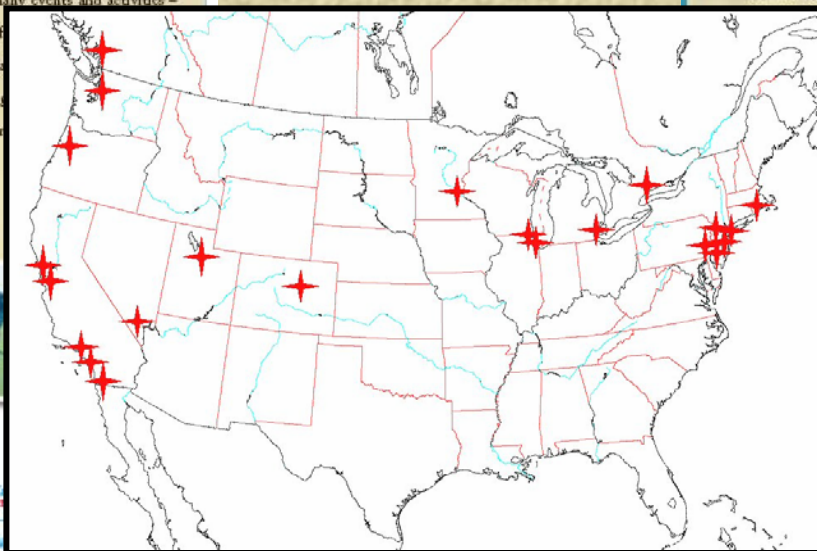
Mau: Hyatt Regency Maui Resort & Spa  
Includes 3rd night FREE & buffet breakfast for 2

from \$1245

Big Island: Sheraton Kona Bay Resort  
Includes 3rd night FREE, buffet breakfast & guaranteed upgrade

from \$1345

Scheduled all the services provided by American Airlines or similar carrier for select Oct 2004 departures. Must book by Oct 4, 2004 with travel completed between Sept 19 & Dec 15th, 2004.



## Newspaper Distribution

### Pleasant Holidays.

**This Fall, VOLCANOES WON'T BE THE ONLY HOT SPOTS IN HAWAII'I.**

This Fall, the people of Hawai'i invite you to discover the many events and activities – including the Honolulu Marathon, PGA Grand Slam of Surfing, Aloha Festivals, and Taste of Lahaina – that make the Big Island so invigorating. When summer winds down and you're looking for a way to stay active, Come Experience Aloha in Hawai'i. It may be fall, but we're just getting warmed-up. Plan your trip now at [pleasantholidays.com](http://pleasantholidays.com)

#### Fall with our off Sale!

2-for-1 Activities - SAVE UP TO 50%!

2-for-1 Activities - SAVE UP TO 50%!

2-for-1 Activities - SAVE UP TO 50%!

#### HAWAII SPECIALS

Resort	Package	Includes	Price
Oahu: OHANA Maie Sky Court	5 Nights Hotel & Air	Includes 1st night FREE	from \$569
Mau: OHANA Maui Islander	5 Nights Hotel & Air	Includes 1st night FREE	from \$749
Oahu: ASTON Waikiki Beach Hotel	5 Nights Hotel & Air	Includes 3rd night FREE, 2-for-1 lunch & breakfast on the beach	from \$835
Mau: Kaanapali Beach Hotel	5 Nights Hotel & Air	Guaranteed one-category upgrade	from \$939
Big Island: Royal Kona Resort	5 Nights Hotel & Air	Includes 3rd night FREE & breakfast	from \$949
Kauai: Radisson Kai	5 Nights Hotel & Air	Includes 3rd night FREE	from \$1215
Kauai: Manicott Kauai Resort & Beach Club	5 Nights Hotel & Air	Includes 3rd night FREE, room upgrade & 75 food & beverage credit	from \$1245
Mau: Hyatt Regency Maui Resort & Spa	5 Nights Hotel & Air	Includes 3rd night FREE & buffet breakfast for 2	from \$1245
Big Island: Sheraton Kona Bay Resort	5 Nights Hotel & Air	Includes 3rd night FREE, buffet breakfast & guaranteed upgrade	from \$1345

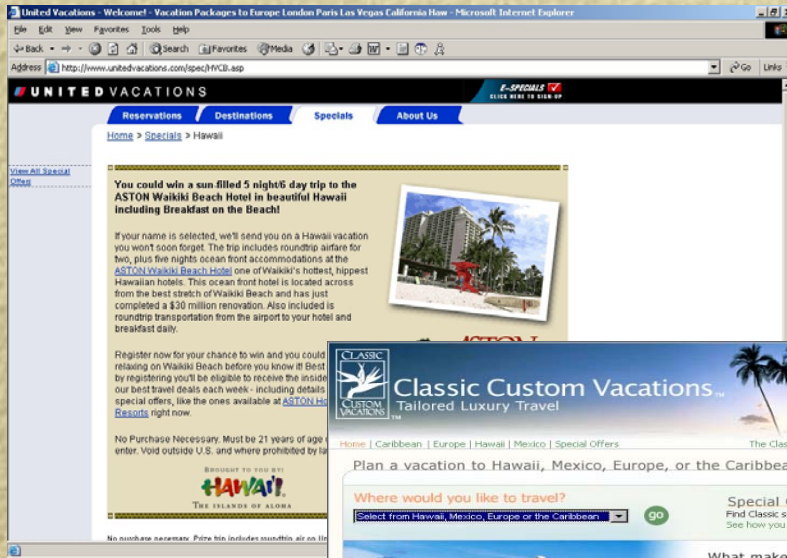
ALL HAWAII ISLANDS: Airfare - Accommodations - Rental Car - Ground Transportation - Breakfast - Beach - Snorkeling - Diving - Golf - Shopping - Spa - Wellness - Entertainment - More!

**Pleasant Holidays.**  
It's not just our name. It's our passion. Since 1959.

For Reservations: [PleasantHolidays.com](http://PleasantHolidays.com) or call 800-448-3333  
OR SEE YOUR PROFESSIONAL TRAVEL AGENT

# Cooperative Programs

## Travel Trade - *Come Experience Aloha!*



United Vacations - Welcome! Vacation Packages to Europe London Paris Las Vegas California Haw - Microsoft Internet Explorer

Address: http://www.unitedvacations.com/specialHCB.asp

**UNITED VACATIONS**

Reservations Destinations Specials About Us

Home > Specials > Hawaii

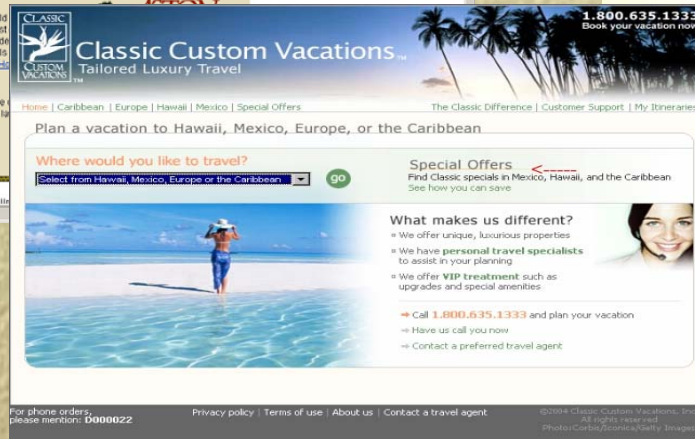
**You could win a sun-filled 5 night/6 day trip to the ASTON Waikiki Beach Hotel in beautiful Hawaii including Breakfast on the Beach!**

If your name is selected, we'll send you on a Hawaii vacation you won't soon forget. The trip includes roundtrip airfare for two, plus five nights ocean front accommodations at the [ASTON Waikiki Beach Hotel](#) one of Waikiki's hottest, hippest Hawaiian hotels. This ocean front hotel is located across from the best stretch of Waikiki Beach and has just completed a \$30 million renovation. Also included is roundtrip transportation from the airport to your hotel and breakfast daily.

Register now for your chance to win and you could be relaxing on Waikiki Beach before you know it! Best of all, by registering you'll be eligible to receive the inside our best travel deals each week - including details special offers, like the ones available at [ASTON Hotels](#) right now.

No Purchase Necessary. Must be 21 years of age or older. Void outside U.S. and where prohibited by law.

**HAWAII!**  
THE ISLANDS OF ALOHA



**Classic Custom Vacations™**  
Tailored Luxury Travel

Home | Caribbean | Europe | Hawaii | Mexico | Special Offers

The Classic Difference | Customer Support | My Itineraries

Plan a vacation to Hawaii, Mexico, Europe, or the Caribbean.

Where would you like to travel?  
Select from Hawaii, Mexico, Europe or the Caribbean

Special Offers  
Find Classic specials in Mexico, Hawaii, and the Caribbean. See how you can save.

What makes us different?

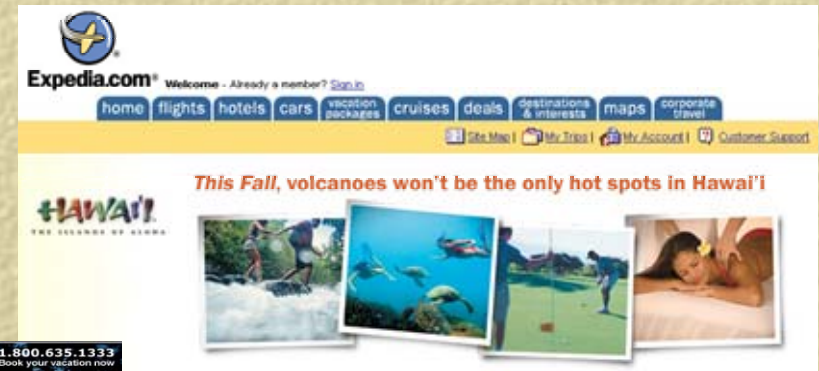
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**HAWAII!**  
THE ISLANDS OF ALOHA

**This Fall, volcanoes won't be the only hot spots in Hawaii!**




Gottmatt - Come Experience Aloha Promotion - Microsoft Internet Explorer

Address: http://www.gottmatt.com/hawaii/offer.asp

**HAWAII!**  
THE ISLANDS OF ALOHA

**COME EXPERIENCE ALOHA FALL 2004**

**TEST YOUR KNOWLEDGE OF THE ISLANDS OF ALOHA AND YOU COULD WIN A TRIP TO HAWAII!**

**FAMILY FUN**  
OUTDOOR ADVENTURES  
GOLF IN PARADISE  
WEDDINGS & HONEYMOONS  
HAWAII ARTS SCENE  
CULTURE & HISTORY

**HAWAII WEATHER**  
86°-92°-95°-98° Partly Cloudy

**START PLANNING YOUR TRIP**  
Help me find...  
OR  
Search the Site

**Funjet Vacations**  
30 YEARS OF FUN

**Funjet Vacations**  
Hula to Hawaii and Receive a FREE Local! A vacation to Hawaii isn't complete without attending a traditional Hawaiian Luau, so we're giving you the chance to experience this tradition FREE - a savings of up to \$144 per couple! Come experience Aloha in Hawaii this fall with Funjet Vacations! Plan your tropical Hawaiian escape with your local travel agent or visit [Funjet.com](#) today.

**Expedia**  
Hawaii on Sale  
Come Experience Aloha in Hawaii with Expedia! Save on Hotels and Vacation Packages with Expedia [www.expedia.com](#)



*It may be Fall,  
But we're just getting warmed-up.*

# Cooperative Programs

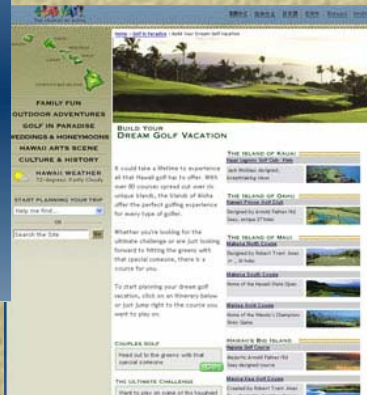
*Travel Trade - Come Experience Aloha!*

- Results?
- Partners report:
  - “Bookings up 135.5% in Aug and Sept 2004 compared to 2003”
  - “Hawai‘i passenger volume showed a 7.4% growth YOY for Aug - Dec 2004. 6,307 vs. 5,875 in 2003”
  - “Hawai‘i Bookings up 30% to Hawai‘i for travel Sept - Dec 2004. 16% increase in revenue per passenger to Hawai‘i for travel”
  - “Sales up 29% YOY for Sept - Dec 15. \$16.7M vs. \$12.9M in 2003”
  - **We did this with three destinations in the Fall of 2004 – The Caribbean bombed, Mexico did so-so, but Hawai‘i was through the roof!**

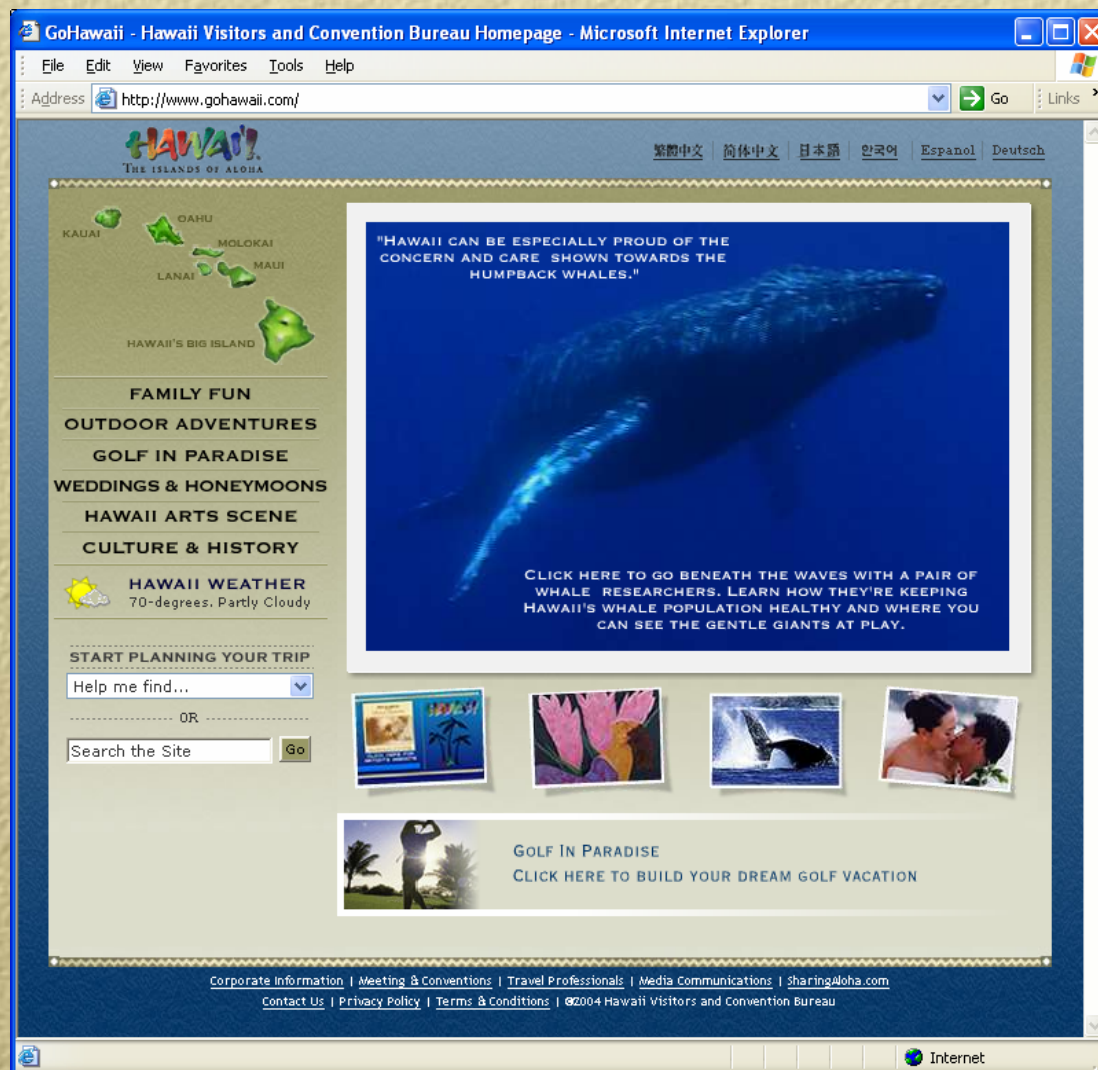
# Cooperative Programs

## Fall Online Golf Promotion

- 18 Golf industry coop partners
- Rich media on Forbes.com, Seattletimes.com, Chicagotribune.com. Search campaign on Google, Overture/Yahoo!
- 10 million targeted impressions
- 60K clicks to gohawaii.com golf section

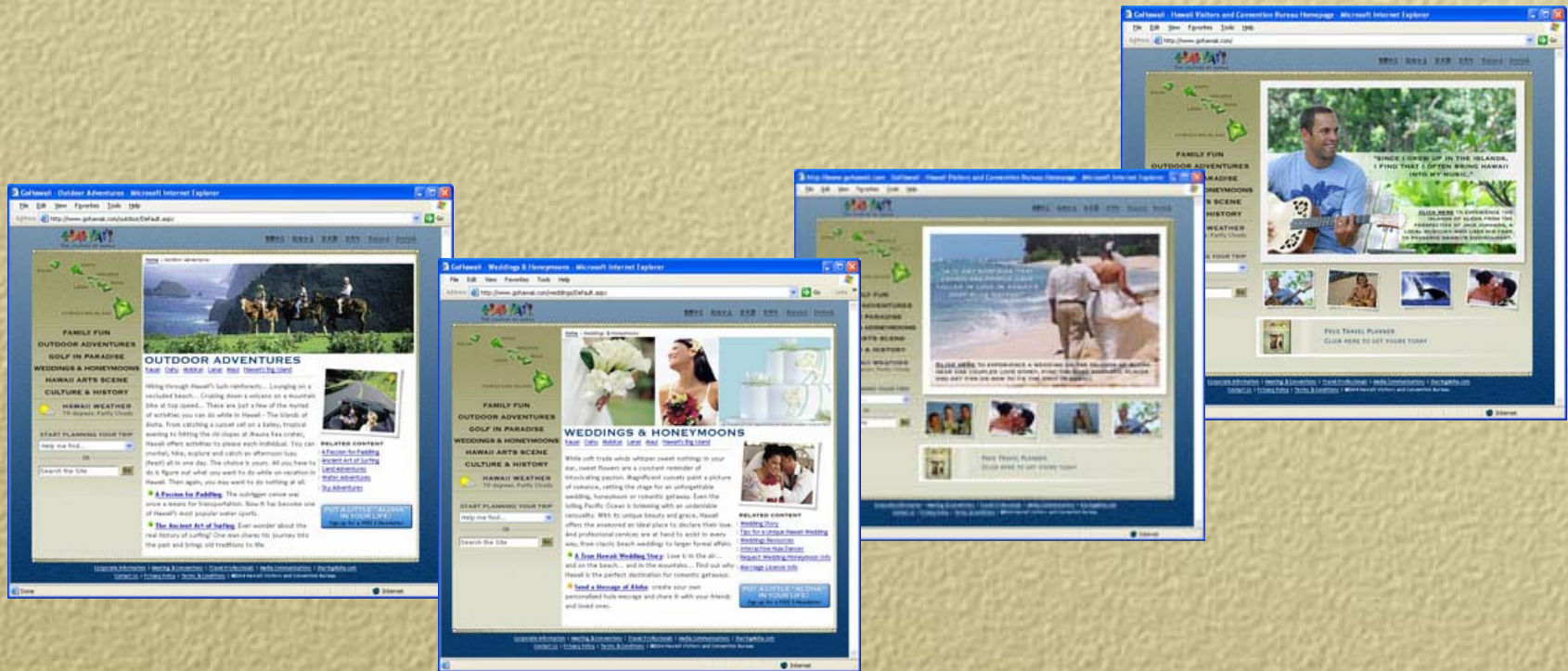






# Gohawaii.com

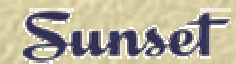
- Top 25% traffic volume of travel sites in 2004 (Hitwise)
- Traffic Spikes during online / offline promotions
- New measurements / tracking tools



# **2005 Program Overview**

# “The people of Hawai‘i would like to share their islands with you.”

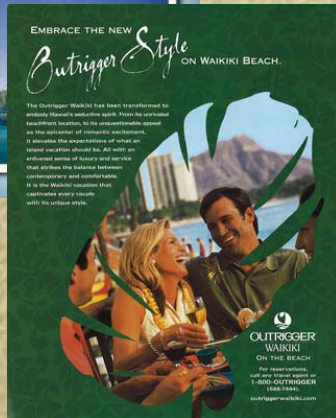
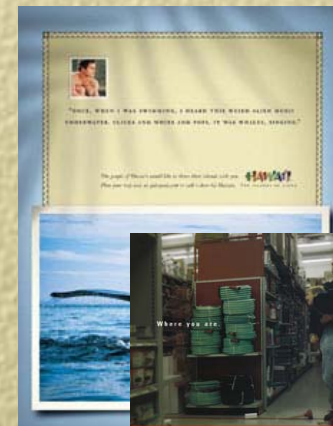
- Public relations, magazine and television advertising continue to set the platform



# Cooperative Programs

## Industry Partners

- 2004 15 partners - \$321,228 industry contribution
- 2005 20 partners - \$427,566 industry contribution



# Golf Initiative

## Golf Channel 'Aloha Swing'

- Entire month of January 2005 featured Hawai'i
  - Golf, activities, attractions, culture, cuisine etc.
- Over 50 hours of live programming from Hawai'i
- Over 100 hours of Hawai'i-themed programming
- Hawaiian theme music
- Hawai'i features and vignettes throughout the month
- On-air promotion began in November
- Integrated on-air/online "Watch and Win" Consumer sweepstakes – 10,000 entrants





**HAWAII**  
Visitors & Convention Bureau

- NEW YORKER



# Shoulder Season Programs

## Fall 2005: Aloha Festivals & Activities

- Advertising – TV, Print, Vacation Planners
- E-Marketing – Website, E-mails, Online Campaign
- PR – Aloha Live, Aloha Festivals, News Releases, Media Blitz and Pitches
- Travel Trade – Wholesaler Co-op Program, Product Launch & Trade Shows, Agent and Call Center Training



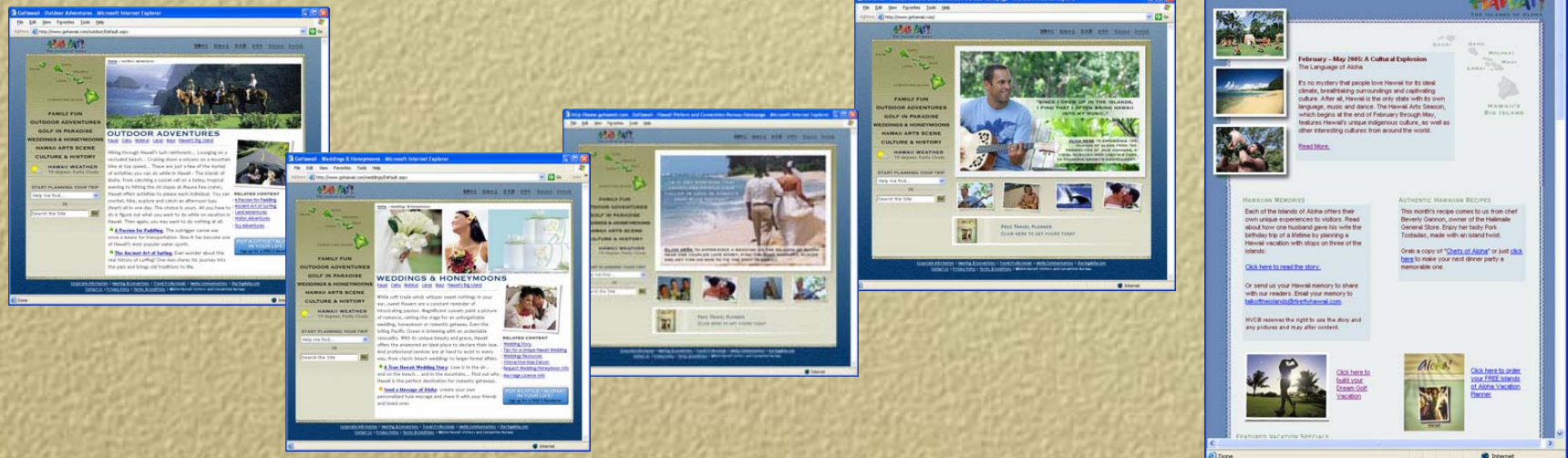
# Travel Trade

- Participation at fewer events – with greater impact
- HVCB Central and Island Chapter coordination
- Hawai'i Destination Specialist (HDS) program Re-launch

The logo for the Hawai'i Destination Specialist program. It features the words "Hawai'i", "Destination", and "Specialist" stacked vertically in a cursive, script font. The text is multi-colored, with "Hawai'i" in red, orange, and yellow; "Destination" in blue, green, and yellow; and "Specialist" in blue, green, and red. A thin vertical line is positioned to the left of the text.

# E-Marketing Programs

- Adjustment of website based on usage data
- Addition of “Click-to-Talk” on website
- Evolve online communications tools
- Increase sophistication of E-newsletter program



# New Initiatives

- Pursue another national television opportunity
  - A la American Idol
- Complete review of collateral materials
  - Including Islands of Aloha travel planner

# Performance Data

## Macro Level Indicators

- Provide insights into how HVCB's overall mix of integrated marketing programs is performing
- Tracked by the ongoing Hawai'i Marketing Effectiveness Study, conducted by research consultant TNS for the Hawai'i Tourism Authority.
- The study tracks marketing performance in terms of travelers' interest/intentions in visiting Hawai'i, as well as, travelers' perceptions of Hawai'i on a number of key brand attributes. The study doubles as both a performance tracking tool and a source of valuable insights into the marketplace.

# Performance Data

## Program Level Indicators

- Track HVCB performance at the level of individual marketing programs in order to determine which of the programs in the Bureau's integrated marketing mix are the most effective.
- Program-level metrics tracked on an ongoing basis include:
  - Exposure: Impressions, circulation (print), GRPs/TRPs (television)
  - Attendance at special events (i.e., concerts, bridal shows, tradeshow, etc.)
  - Customer contacts by phone, fax, email, mail and walk-ins.
  - Incoming 800# call volume
  - Islands of Aloha vacation planner requests by source of request (Internet, Call Center, publication)
  - Travel trade bulk fulfillment
  - Online Indicators: Page views, visitor sessions, unique visitors, WebTrends metrics.....

**Aloha!**